

The role of brands for the valorification and touristic development of Sibiu county

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Abstract— Sibiu county represents a touristic destination of reference and tradition for Romania. On its 5432 kmp, 11 cities and 162 villages can be found, which sums up 424855 inhabitants. According to its main geographical reference points and the nature of the composing elements, the county is generally divided in 6 touristic areas (fig. no 1).

Sibiu county benefits of numerous *brands*, some of them are older (which practically identify with this area) and other are newer. At first glance, this aspect can only be positive, but in time, we can observe some negative aspects as well, such as erosion of its attractiveness, due to a big pressure of the space, or the creation of an infrastructure of profile, which later proves to be oversized. This can only lead to the next question: is it more effective and durable to develop brands for all touristic resources of which we possess (with the risk of having too many at a certain point in time) or first establish the brand/brands and consequently develop the infrastructure?

Presently Sibiu county undergoes a process of repositioning on the touristic market, and especially on it the internationally one. It has the potential of becoming a special destination for the tourists who wish to experiment new destinations, learn about the lifestyle and authentic local culture, live personal experiences that will offer them profound satisfactions.

Keywords — occupational degree, over sizing, priorities, risks, touristic brand, touristic valorification, touristic development, touristic infrastructure, touristic traffic, strategies.

I. INTRODUCTION

The quasi-central position within Romania in the southern-western part of the historical province of Transylvania, make of Sibiu county an area of maximum promotion, that polarizes the neighbouring areas with a certain vocation and, at the same time, a flow of energies directed towards the scenery, as possible vectors for transforming its structure. The harmonious association of natural and anthropogenic components confers a high degree of attractiveness to the space.

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Within the Master Plan for the National Development of Tourism from Romania 2007-2026, whose main objective is "the transformation of Romania into a quality touristic destination based on its natural and cultural heritage which corresponds to the standards of the European Union regarding the supply of products and services until 2013 and the achievement of a sustainable development in terms of environment of the touristic sector in a superior rhythm of development than other touristic destinations from Europe", Transylvania is identified as a priority area for the sustainable development of tourism (*The Master Plan for National Tourism of Romania 2007-2026 MDRT*), based on a wide range of resources that this old province, comprising Sibiu county as well, has to offer, including the opportunities connected to the cultural, rural, ecological, mountain and adventure tourism.

An essential condition of the sustainable development is integration. The main way of integrated development of tourism from the region is *The Transylvania Tourist Circuit* that proposes to delimit the areas with important resources for the support of the sustainable development of tourism and for the creation of a defining product (brand) for the development of tourism in rural areas, materialized through the increase of the number of visitors, the extent of their staying and the amounts spent by them.

Sibiu county has a very complex touristic potential. The alternative landscape, the over 450 historical and architectural monuments, the museums and the ethnography elements are only several of the landmarks that place it among the reference and traditional touristic destinations of our country.

The analysis of the current situation and the appreciation of the impact of tourism development have allowed the identification of some aspects among which:

- the impact of touristic traffic on the natural and architectural heritage - without degrading the touristic objectives and without negatively affect the activity of the local people;

- the need to diversify the touristic offer and especially of their attraction outside Sibiu, which becomes more and more crowded;
- the need to attract other segments of tourists, including the business tourists;
- the need to improve the touristic brand and the touristic information services;
- the need to create business opportunities on a local level, especially in crafts for the production of traditional objects for the tourists;
- the need to increase the touristic accommodation structures and to modernise the existing ones (as well as in other areas of the county outside the famous ones), but also to adapt to the local specific features, in the case of rural tourism, agro-tourism;
- the development of internal and regional connections by creating adequate touristic circuits.

II. PROBLEM FORMULATION

A. Sibiu touristic brand

Branding is the key to success for any tourist destination and Sibiu has initiated for this purpose the repositioning on the international market for this purpose. The building of a powerful touristic brand shall represent a certainty for the future of the touristic industry within this region, for its sustainable development. Sibiu is an extraordinary destination for the tourists willing to experiment new destinations, a certain way of life and authentic local culture, as well as some personal experiences, which offer profound satisfactions.

Sibiu should represent a powerful touristic brand, nationally as well as internationally. Sibiu "Brand" as a touristic destination was initiated in 2007 together with the declaration of Sibiu as the *European Cultural Capital 2007*¹, together with Luxemburg. Despite all the promotion it benefited from, the international touristic markets have not been sufficiently informed yet, in order to increase the degree of attractiveness of the city and the county for foreign tourists.

The costs regarding the organization of this event summed up to approximately 50 million Euro. 337 projects have been developed, which totalized 2062 events. According to the statistics provided by the local city hall, the influence upon the touristic traffic has been tremendous - the number of tourists has doubled since 2006 and tripled since 2005. From these, 40% were foreign tourists (60-70% being of Germanic origin,

taking into account the historical and multicultural traditions of the county). Financially speaking, the impact was significant as well, registering important increases in different domains: hotelier - 80%, tour-operator - 76%, transport - 75%, industry - 49%. A different category of positive impact was the media one².



Fig.1. The official logo of the event

Apart from this unique event/brand in Romania, Sibiu county possesses a series of other "trade marks", such as *the medieval atmosphere* (Sibiu - nucleus of touristic attractions) or *museums* (Brukenthal and Astra are amongst the first 5 at a national level, taken into account the number of visitors) but also *the rural tourism* (Sibieli and Rasinari being the most famous ones)³.

All these brands can be grouped in:

→ International touristic brands – Sibiu city itself or objectives/events that take place here (such as The International Theatre Festival from Sibiu - *The Faust Show*⁴ or Brand Film Festival from Sibiu);

→ National touristic brands – Marginimea Sibiului, Brukenthal, Balea lake, The Ice Hotel, Transfagarasan, The Medieval Festival from Medias - *The Mysteries from the Fortress of Light*;

→ Transylvanian (regional) brands - The Fair of Traditional Foods (in Sibiu most of the traditional Romanian culinary fairs originate), The Wedding from Sibieli, The Festival of the Peony from Gura Raului, The Pottery Fair from Sibiu, The Cheese and Plum Brandy Festival from Rasinari, etc.

² The British Journal *The Guardian* included Sibiu amongst one of the first 10 places of the website "50 touristic fabulous locations" and in the category of touristic information, Sibiu was placed on the ninth position, being surpassed by cities like New York or London.

³ Concepts in the rural area: "living museums" (*Regional Eco-museum*) or "Independent Village" (*whole village*).

⁴ Considered by a certain segment the *new touristic brand of Sibiu*, after the European Cultural capital

¹ Considered "Country Brand in 2007" by the Ministry of Culture.

Taken into account the diversity of actual brands (most of them of local or regional influence) doesn't supply from the point of view of the value of the statistic indicators the brand of *Cultural European Capital of Sibiu*.

Hence, the need to develop and to efficiently communicate a strong image of *SIBIU* brand, to create a powerful identity of the brand and to implement it in all the levels of the touristic industry, certainly allowing an increase of the market share formed of foreign and Romanian tourists as well. An important role for this purpose is the positioning of the region, which must be based on the uniqueness of the touristic resources. The visibility and the attraction of the region as a touristic destination shall undoubtedly increase at the same time with the consolidation of this touristic product.

Among *the priorities of the local authorities* we have to mention the connection of Sibiu brand to that of Romania, in order to have a major impact, to achieve an integrated approach of the brand on all levels of the touristic industry, the assurance of a proper strategic frame allowing the achievement of partnerships and the encouragement to develop "icon" products to be representative/distinctive for the area of Sibiu (the fortified churches, the German architecture, the Brukental brand, etc).

B. Generator and limiting factors of the touristic activity in Sibiu county



Fig. 2⁵

Regardless of the applied method for the evaluation of the touristic resources (TECDEV, the General sole rank,

etc.), Sibiu county has high values, classifying in the first category of the country.

The main generating factor has naturally been the extremely diversified potential in the national hierarchy. This has generated the achievement of a rich touristic infrastructure, but also focused on certain areas, determining the high pressure on the local resources.

The analysis from Table 1 (processed after *The SWOT analysis after the Masterplan of touristic development of CJ from Sibiu*) summaries the advantages and the restrictions connected to the touristic activity.

III. PROBLEM SOLUTION

A. The touristic flow

Although the number of accommodation units has had an ascending evolution, their usage is low - the maximum level of 2002 was not exceeded in 2007 either. This fact shows that the rhythm of increase of accommodation structures was higher than the recorded number of tourists.

In *tables 2 and 3*, we have shown that, although there is a touristic area of first rank in the country, the values of the two relevant indicators for the touristic flow are inferior to the regional and national environments (a reduced level of valorification of accommodation facilities).

In other words, although from a quantitative point of view, the potential, infrastructures, and number of tourists present high or very high values, from a qualitative point of view - that of their usage- the situation is modest.

B. Touristic infrastructure

Tourism is already pressing in some sectors on the existing infrastructure and a potential estimated increase shall have a major impact upon certain structures (of natural or anthropic level) of the county and its attractions, as well as regarding the perception of the visitors on the destination.

The results of the inability to properly plan the development of tourism may be seen in a series of locations, where the infrastructure is overwhelmed by the number of tourists.

⁵ Source: *Sibiu County Tourism Agency*

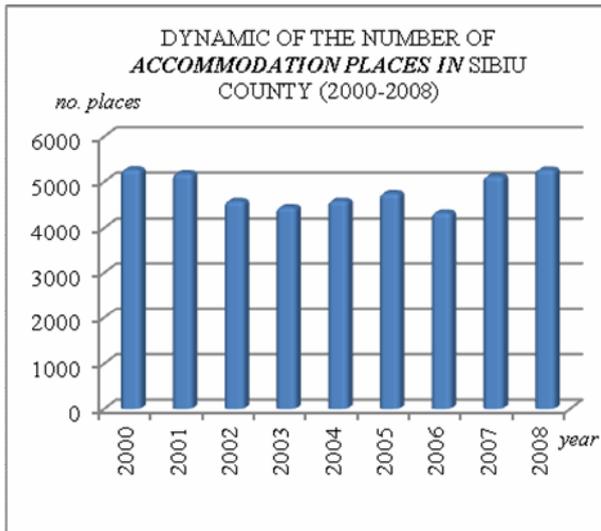


Fig. 3

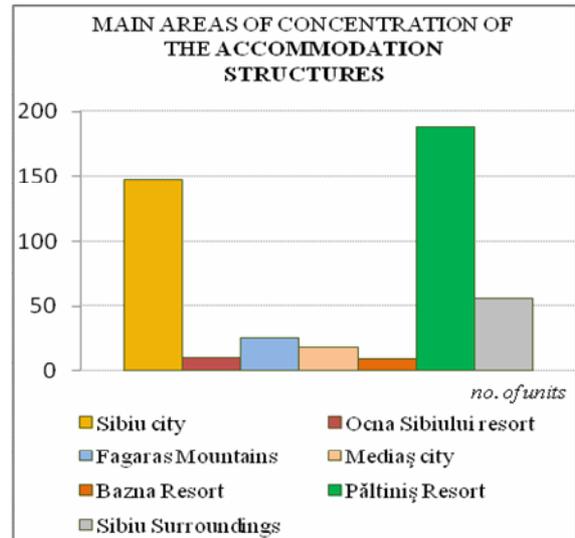


Fig. 4

Table I

Strong points:	Weak points:
<ul style="list-style-type: none"> ☑ The status of Sibiu city as an ex European Cultural Capital in 2007 ☑ Mărginimea Sibiului is a famous ethnic and folkloric as well as agro-tourist area ☑ The support of tourism development by the local authorities (the achievement of promotional materials; local initiative in tourism promotion - new routes; the development of the network of tourist information centres) ☑ Numerous initiatives, public or private, which aim at the promotion of the less known areas of the county ☑ The existence of a specific for more than the localities of various areas ("the bread from Gura Râului", "the storks from Cristian", "brooms in Fofeldea", "gorges in Brăteiu", etc.) ☑ The rich and varied touristic offer in comparison with other areas from Romania ☑ Acknowledged cuisine (cheese, meat specialities) ☑ The position in the middle of the country on major road routes and the existence of the international airport in Sibiu ☑ The numerous natural areas have been very well preserved ☑ Two UNESCO monuments ☑ The Natura 2000 sites cover almost half of the county territory ☑ The international interest in certain areas from Sibiu county (various organisations from Germany, Great Britain, The United States of America, France, etc.) ☑ The opening of the European Institute Office for Cultural Itineraries in Sibiu ☑ Diversification of the offer of direct airline connections from/to Sibiu ☑ The touristic profile of Sibiu county joins the tendencies in tourism at a European level 	<ul style="list-style-type: none"> ☑ The inexistence of explicatory signs for various monuments, of some audio guides in more languages ☑ The insufficient preparation regarding the entrepreneurship and the tourist management of some hostel owners ☑ Poverty in certain localities ☑ Problems connected to the tourism personnel (poor quality training of the personnel working in tourism/the lack of qualified personnel) ☑ The lack of specialised institutions for the training of personnel in tourism ☑ The legends, the historical events, the guilds are not very promoted ☑ The lack of "alternative" tourist resources, like the biodiversity of the fauna and the flora ☑ The lack of complete information on the tourist objectives/routes from the county in digital/on-line format ☑ Limited coverage of the quality souvenirs demand ☑ A series of historical monuments are in a very advanced degree of degradation ☑ Deficient infrastructure in some rural areas ☑ The relatively reduced number of "bio" certified agricultural manufacturers (in spite of exceptional product quality) ☑ The measurements for the increase of the mountainous tourist product safety are still in initial stages (we mention the fitting of mountainous areas places to rest, the efficiency increase of the Rescue services, the training of a larger number of mountain tourist guides, the proper signalling and the marking of all the mountainous tracks)

<i>Opportunities</i>	<i>Risks</i>
<input checked="" type="checkbox"/> The superior valorification of some tourism niches (extreme sports, ecotourism) <input checked="" type="checkbox"/> The extension of the skiing area in Cindrel Mountains, as well as in Fagaras Mountains. <input checked="" type="checkbox"/> The diversification of tourist services/the development of entertainment and recreational activities <input checked="" type="checkbox"/> The superior valorification of the local cuisine <input checked="" type="checkbox"/> The fructification of a rich history of the area <input checked="" type="checkbox"/> The promotion of ethno-cultural values and ethno-folklore. <input checked="" type="checkbox"/> The access to available structural funds in the field of tourism <input checked="" type="checkbox"/> The existence of external and internal collaboration partnerships in the field of tourism	<input checked="" type="checkbox"/> The lack of cohesion/communication between local authorities regarding the common programs integrated/centred towards the development of tourism. <input checked="" type="checkbox"/> The depopulation and the aged population in the rural areas <input checked="" type="checkbox"/> The destruction of the natural environment by regulating and limited control of the human activity and because of the lack of technical infrastructure (channelling/treatment plants). <input checked="" type="checkbox"/> The increase of the development difference between small towns and Sibiu city <input checked="" type="checkbox"/> The increase of the tourism share illegally as an effect of the economic crisis <input checked="" type="checkbox"/> Legislative instability

Figure no 5 presents the area of developing of the main types of tourism from Sibiu county. Figure no 4 also represents the degree of concentration of the accommodation facilities, and the fact that these are predominantly present only in two areas - Marginimea Sibiului and Sibiu city. It is also noticeable from these representations the paradox of having areas with several more touristic infrastructures than needed and sub-dimensional areas, through supply and demand point of view. The number of tourists is larger in the first case, and so is the supply. In the second category of areas, there are not that many tourists, in stead the supply is very limited (from a quantity and quality point of view, especially the structures of food service and recreation).

The total *accommodation capacity index* has values below the national average score. On accommodation units, higher values are registered by the villas, chalets, motels, and agro-touristic pensions (biggest differences regarding villas) but reduced as far as hotels, hostels,

touristic pensions, bungalows and camps (biggest differences regarding camps). This indicates the fact that the number of these accommodation facilities is too high compared to the existing request, raising problems from the point of view of economical efficiency with all the aspects it involves.

The medium accommodation period presents values from 1,52 days to 2.07 days, with an annual average of 1.75 days (this below the national average score). The explanation in this case could be connected to the high weight factor of tourism types for which is characteristic to short stay (such as cultural-itinerant).

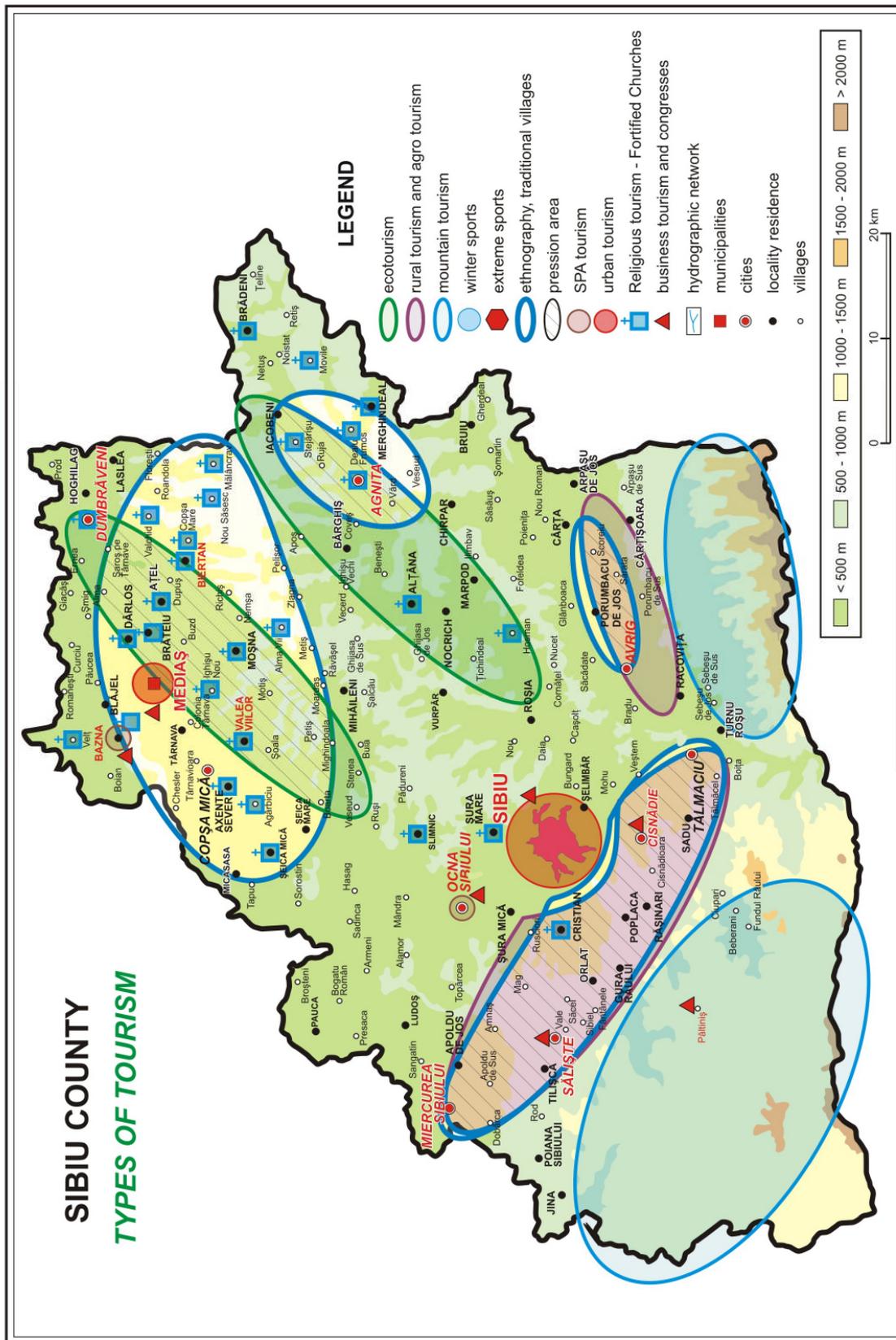
The parameters of these indicators require rapid, concerted measures of encouraging other forms of tourism as well, or resolving the issue of rural or balneary tourism in particular, where the stay is longer. As far as balneary tourism we can't expect spectacular changes, because there are not too many resorts, usually bearing local or regional importance.

Table II. The accommodation capacity index of usage on types of units (2010)

	Total	Hotels	Villas	Cottages	Motels	Hostels	Tourist hostels	Agro-tourist hostels	Bungalows	Camps
Romania	25.8	30.8	19.3	7.6	19.2	17.8	14.0	11.7	12.8	17.2
Reg. Central	23.6	33.3	14.8	9.9	20.5	15.5	12.6	12.9	12.9	16.9
Sibiu county	20.9	24.8	28.9	8.7	19.5	12.9	8.9	14.5	6.7	8.4

Table III. The average duration of stay in 2010

Month	Jan.	Febr.	March	April	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Average
Duration of stay (days)	1.52	1.70	1.56	1.60	1.76	1.80	1.93	2.07	1.78	1.68	1.67	1.75	1.75



Adaptation after „Masterplan tourism Sibiu 2010”

Fig. 5

The biggest expectations come from rural tourism, accommodation infrastructures, which is very well represented from the point of view of

The evolution of the number of public food structures has had a positive trend, correlated with the accommodation structures, but in a more decreased rhythm.

Seen as an assembly, the food service network accessible to tourists may be considered in the following manner:

- sufficient from a quantitative point of view and diversified from a qualitative point of view in the case of Sibiu and other urban centres;
- relatively satisfying in case of the resorts;
- unsatisfactory, especially in number, in the rural touristic areas.

Moreover, comparing the level of the county, *the number of places in the public food units with the number of accommodation places*, we come up with values close to the normative, but regionally the things are slightly different, with areas lacking this type of units (for instance Valea Hârțibaciului).

On the contrary, the *recreational and spa structures* have not had the same rhythm of evolution. Taking into account their role in the increase of the occupational degree and the extension of the stay, this aspect may be constituted as an explanation as well as a solution to the current problems. It is necessary to develop and to also diversify these structures further more. A positive example in this matter is the fitting and the modernisation of natural lakes with therapeutic effect from Ocna Sibiului (which offers accommodation, treatment, food service, leisure on a limited area - a role of integration that was achieved through a series of private and public-private partnerships).

IV. CONCLUSION

A. Risks versus opportunities in the sustainable tourism development

To identify a commercial brand in general, respectively a tourist one especially, represents a very difficult attempt firstly because of the complexity of elements that it needs to synthesise in a very concise formulation. There are many situations when a very well defined brand triggers negative effects on the respective product over time as well. From a touristic point of view, a product that sells very well may come to create a very heavy pressure on the space that may lead to the alteration of attractiveness. Another possibility is the one to determine, in its peak phase, due to the high intensity of the tourist traffic, the creation of profile infrastructures that may subsequently prove oversized.

The brand of *European Cultural Capital* of Sibiu was a great success for the city and triggered the development of the touristic accommodation infrastructure in this area of influence as well. After 2007, the touristic flow has considerably reduced (the current economical crisis had its impact as well), therefore the accommodation capacity has reduced as well. On a city level, the degree of occupation registers normal values, even very good values (up to 80-85% during some periods of the year) while in the surrounding areas has decreased a lot, in some instances below the limit of economical efficiency. This is underlined by the fact that a series of accommodation capacities have remained unfinished in different stages of construction, while others are for sale (most of them can be found in the mountain area, respectively Paltinis resort (ex. photo no. 1) which can represent a typical example of miscorrelation between the accommodation structures and the leisure ones on one hand, and between the food service ones on the other hand- not from the point of view of quality, but diversity). This general tendency of only offering accommodation is in fact one of the explanations of the present situation. The misperception from a large number of private investors that tourism only means accommodation, has serious consequences in present.



Photo 1

A powerful brand, like the European Cultural Capital, may transform into a "passing" one or into a trap, if it is not compensated, supported further on by other elements. The other brands mentioned above, should, theoretically, succeed to compensate this brand, to sustain the created infrastructures. According to statistics, this thing didn't happen, despite the existing image and perception.

The resorts through their specific, can constitute poles of development for the valorification of the touristic objectives of the county. It is an important direction that

should be followed if we take into consideration the fact that the resorts from Sibiu county don't come up to the level of the overall image of the county from a touristic perspective, and don't value the specific resources to the level of the existing possibilities (analyzing fig. no. 4 we can notice their marginal position inside the concentration areas of touristic activities – Bazna, Miercurea Sibiului, or Ocna Sibiului, which is not even included in any of these areas). Almost all the aspects specified may apply and carry out in/through the resorts. At the present moment only two of these can play such a role - Paltinis and Ocna Sibiului. A solution for the smallest ones, can be the valorification of other local touristic resources, as an attempt of integration which would compensate the reduced power of attraction of natural factors of cure. These actions could be eventually accompanied by "a rebranding" that could rapidly create a new image.

- *powerful brand* → *European Cultural Capital* → "transitory" → trap
- *high demand* → *numerous accomodation structures* → at present without sufficient request
- *food service structures* → *balanced display* → on large areas insufficient from quantity and quality point of view
- *leisure structures* → *poor at present and increasing*
- *resorts* → *raising poles for the valorification of the touristic strong points.*

High touristic pressure - an example of exceeding the psychological welcoming capacity (Rasinari and Transfagarasan - Balea Lake) - Photo 2 and 3.



Photo 2



Photo 3

B. Target groups

For resolving such issues, the touristic offer has to be adapted to different forms of tourism, depending on the niches present on the national and international markets at a certain moment in time.

Table IV. The potential tourist demand

<i>New tourist target segments (insufficiently exploited)</i>	<i>Resources offered by Sibiu county</i>
<ul style="list-style-type: none"> • The Romanian retired people with a good material status, eventually accompanied by grandchildren, or for tourism that combines cultural objectives with the fresh air, or for treatment and wellness 	<ul style="list-style-type: none"> • Exceptional Curative factors • Quality spa facilities • Naturally relaxing environment
<ul style="list-style-type: none"> • The Jewish and the Russian markets are open for wellness tourism or in the case of the first market indicated products which exploits the Jewish people from the area 	<ul style="list-style-type: none"> • Quality services and conditions specific for the wellness tourism, at competitive prices
<ul style="list-style-type: none"> • Young people aged 25-35 years, interested in the active tourism from Centre and Eastern Europe (Slovakia, Slovenia, Hungary, Croatia) 	<ul style="list-style-type: none"> • Famous areas, wild landscape • the improvement of safety in the mountainous tourism
<ul style="list-style-type: none"> • The horseback riding aficionados from Great Britain, drawn by the specific products 	<ul style="list-style-type: none"> • Unaltered nature • Investments in horse riding • Competitive prices
<ul style="list-style-type: none"> • Tourists from the northern countries, with a passion for unconventional destinations and with an adventure spirit 	<ul style="list-style-type: none"> • Various attractions on the "patriarchal - medieval - modern" axis within a hospitality frame which waits to be discovered.

A recently performed study by *Marketscope SRL* Bucharest, having as beneficiary the Sibiu County Council, reveals the target segments of potential tourists that might be attracted by the most representative elements of tourist potential of Sibiu county (*tab. no. 4*). In this respect, preoccupations regarding a dedicated promotion will have to be adopted, in order to overcome the specific needs, adapted to this kind of request, taking into account the fact that some of these segments concern the niche tourism. These can generate income over the average with minimum impact upon the environment and can also valuate, even though indirectly other categories of resources, specific to classical forms of tourism.

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